CONCEPT

Strategic Financial Intelligence Course: Integrating Planning, Performance and Value Creation



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Introduction:

Strategic financial intelligence, integrating planning, performance and value creation, is a 1-week course for finance directors, financial planning and analysis heads, strategy and performance leads and business unit leaders, ending with a Plan-to-Value Management Framework for their organisation. Many organisations run strategy, budgets, forecasts, KPIs and investment decisions as separate cycles, so plans that look sound on paper fail to create value. Nominees already lead planning, reporting or business units, and teaching is by case study on plans, forecasts and performance data from several sectors. CoreConcept Training Center delivers this strategic financial intelligence course.

Course Objectives:

- Translate corporate strategy into financial targets, value drivers and planning assumptions
- Build value driver trees that link operating levers to return on invested capital, growth and economic profit
- Design driver-based rolling forecasts and scenarios that update decisions rather than only reports
- Cascade KPIs and scorecards from enterprise value targets to business units and run performance reviews on variances
- Evaluate capital allocation and portfolio choices using economic profit and value creation tests
- Assemble a Plan-to-Value Management Framework that connects planning, performance reviews, incentives and investment decisions

Target Audience:

- Finance directors and controllers responsible for planning cycles and management reporting
- Financial planning and analysis heads responsible for budgets, forecasts and scenario analysis
- Strategy and corporate planning leads responsible for translating strategy into targets
- Performance management leads responsible for KPIs, scorecards and performance reviews
- Business unit leaders responsible for delivering plans, margins and returns on capital
- Investment and portfolio leads responsible for capital requests and post-investment reviews

Course Outline:

Day 1: Financial Intelligence and the Value Creation Agenda

- Value-Based Management Principles and the Finance Role
- Return on Invested Capital and Cost of Capital Spread
- Economic Profit and Economic Value Added Calculation Basics
- Strategy, Plan, Budget and Forecast Disconnect Diagnosis
- Current Planning and Performance Cycle Maturity Assessment

Day 2: Value Drivers, Planning Models and Performance Frameworks

- Value Driver Tree Construction From Revenue to Returns
- Strategic Plan Translation Into Financial Targets and Assumptions
- Driver-Based Planning Model Design and Ownership
- Balanced Scorecard Linking Strategy to Measures
- Beyond Budgeting Principles and Adaptive Target Setting

Day 3: Forecasting, KPIs and Performance Review in Practice

- Driver-Based Rolling Forecast Cycle and Horizon Setting
- Scenario and Sensitivity Analysis for Planning Decisions
- KPI Cascade From Enterprise Targets to Business Units
- Variance Analysis Separating Volume, Price, Mix and Efficiency
- Monthly Performance Review Agenda and Action Tracking

Day 4: Capital Allocation, Incentives and Value Traps

- Capital Allocation Tests Using Economic Profit and Payback
- Portfolio Review of Businesses, Products and Investments
- Incentive Plan Alignment With Value Creation Measures
- Sandbagging, Hockey-Stick Plans and Target Gaming Controls
- Value Destruction Warning Signs in Growth and Margin

Day 5: Case Study Practice and the Plan-to-Value Framework

- Manufacturing Case Study on Margin and Capital Turnover
- Services Case Study on Growth Versus Return Trade-Offs
- Investment Committee Case Study on Competing Capital Requests
- Integrated Planning Calendar and Governance Roles Design
- Plan-to-Value Management Framework Completion and Presentation

Skills You Will Gain:

- Value Driver Analysis
- Economic Profit Measurement
- Driver-Based Forecasting
- Scenario Planning
- KPI Cascade Design
- Variance Interpretation
- Capital Allocation Appraisal
- Planning Governance Design

Why Attend This Course:

- Deliver a Plan-to-Value Management Framework to the chief financial officer, the executive committee and business unit heads
- Decide which investments, products and business units should receive capital, based on their contribution to economic profit
- Avoid plans, budgets and incentives that reward growth or volume while returns fall below the cost of capital
- Coach planning, reporting and business teams on the value driver trees, forecast cycle and review agenda practised during the course

Conclusion:

Back at work, the participant gives the Plan-to-Value Management Framework to the chief financial officer, the executive committee and business unit heads. They use it to set targets from value drivers, run rolling forecasts and monthly reviews on the same logic, and test capital requests against economic profit. After the first full planning cycle, the organisation should compare forecast accuracy, economic profit by unit and decision speed with the baseline, and adjust drivers, KPIs and incentive links that did not work.

Frequently Asked Questions FAQ:

What should participants know before a strategic financial intelligence course on planning, performance and value creation?

Participants should already lead or contribute to planning, reporting, budgeting or a business unit, and read financial statements confidently. Bringing a recent plan, forecast or KPI pack helps them apply the case studies to their own organisation.

How does a strategic financial intelligence course differ from a budgeting and forecasting course?

Budgeting courses teach how to prepare and control a budget. This course links strategy, driver-based forecasts, KPIs, incentives and capital allocation into one system judged by value creation, so planning decisions are tested against returns and economic profit.

Why does economic profit matter in strategic financial intelligence and value creation?

Economic profit shows whether a business earns more than its cost of capital. Profit growth can still destroy value when returns fall below that cost, so economic profit gives planners a clearer test for targets, investments and incentives.

What do participants take back from the strategic financial intelligence course?

Participants take back a Plan-to-Value Management Framework with a value driver tree, target-setting logic, a rolling forecast and review cycle, a KPI cascade, capital allocation tests and a governance calendar ready to present to their executive team.